**Title of post:** Pension Benefits Officer - Member Services

**Grade:** Grade E

**Responsible to:** Pension Benefits Team Manager

Purpose of Post: To carry out the tasks needed to administer LGPS pensions on a day-to-day basis. To calculate pension benefits correctly and ensure they are paid on time and in line with expectations. To keep GMPF members informed about their benefits and provide information to them about any choices they have.

Main Duties & Key Responsibilities:

1. ***To be responsible for the completion of your workload, the calculation of pension benefits and peer review***

* Support your Team Manager in delivering the objectives set for the Members Services section
* Be responsible for managing and monitoring your own workloads and complete tasks allocated to you within the allotted timescales
* Liaise with your Team Manager and Senior Officer to determine workload priorities and understand their expected completion times
* Calculate pension benefits in line with the statutory regulations and following your team’s standard procedures
* Be jointly responsible for ensuring all pension benefits calculated by your team are done so on time and within the agreed performance targets
* Update pension member records accordingly and ensure the information recorded is accurate and up-to-date
* Ensure any queries relating to member data or benefit entitlements are immediately investigated and rectified if necessary
* Ensure pension members are provided with accurate and relevant information about their benefits and about any options or choices they have
* Communicate pension information to members or other stakeholders effectively by telephone, letter, e-mail or face-to-face
* Ensure compliance with all legal and policy requirements, such as data protection requirements, IT security polices and similar
* Assist and provide support to your fellow Pensions Benefits Officers and Assistants, particularly with any unusual or high priority casework, and complete any casework allocated to you
* Carry out peer checking of work within the agreed timescales
* Assist with training other members of your team
* Provide feedback when peer checking and training other members of the team to your Senior Officer and Team Manager in order to assist with individual and team training and development
* Contribute to the delivery of all projects being carried out affecting your team and be responsible for completing your allocated tasks to the highest standard
* Assist with testing new pension software releases and new developments as and when required
* Adhere to the cover arrangements required on your team and ensure any office policies and procedures are followed and adhered to
* Provide cover for other Pensions Benefits Officers on other teams whenever required
* Liaise with GMPF employers, partners, third party suppliers and other agencies such as DWP and HMRC where required

1. ***To be responsible for your own self-development and contribute to the overall success of the service***

* Maintain your own working knowledge of the LGPS and any other relevant legislation needed to carry out your role
* Be responsible for assessing your own training needs and feeding this back to your Senior Officer and Team Manager, and identify ways in which you might want to develop and progress in your role
* Contribute to the upkeep of all team training manuals and guidance notes, ensuring they are kept accurate and up to date
* Assist with ensuring your team prioritises customer outcomes and focuses on delivering high standards of service and ensure all procedures relating to customer feedback are followed
* Identify improvements to the service provided to GMPF members and liaise with your Team Manager to appraise and implement these
* Promote a culture of openness, inclusiveness, positivity, inventiveness and ingenuity

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| **PERSON SPECIFICATION REQUIREMENTS** | Essential (E) or  Desirable (D) | How it will be assessed |
| 1. **Education Standard / Qualifications** |  |  |
| Practical ability in written English and Mathematics to GCSE grade A to C or equivalent | D | Application form |
| Qualification in pensions, payroll or similar administrative discipline | D | Application form |
| Knowledge |  |  |
| A knowledge of the LGPS or other pension scheme(s) | D | Application form, Interview |
| An awareness of Data Protection legislation and its implications and importance for our service | E | Application form, Test, Interview |
| Experience of: |  |  |
| Working effectively as part of a team, and training and supporting other team members | D | Application form, Interview |
| Calculating pension benefits and entitlements | D | Application form, Interview |
| Processing casework and keeping members / clients / customers informed of progress | E | Application form, Interview |
| Managing your own workloads and working to deadlines | E | Application form, Test, Interview |
| Contributing to projects and the implementation of new procedures | D | Application form, Interview |
| Assisting with resolving customer complaints and applying learning from feedback | D | Application form, Test, Interview |
| Skill and ability to: |  |  |
| Calculate pension benefits and perform manual calculations if needed | E | Test |
| Identify processing or calculation issues and investigate them | E | Test |
| Interpret complex information and respond to queries about pension regulations or legislation | E | Test, Interview |
| Write clear, concise letters and e-mails | E | Test |
| Talk confidently to members on the telephone and be able to explain complex rules or processes in a clear and appropriate way | E | Application form, Interview |
| Communicate well with a range of audiences including colleagues, senior managers and outside agencies | E | Application form, Test, Interview |
| Recognise where issues need to be treated confidentially | E | Test, Interview |
| Demonstrate empathy and deal appropriately with members experiencing bereavement or similar | E | Test, Interview |
| Determine your own work priorities | E | Test, Interview |
| Have an awareness of wider service demands and issues and recognise pressures that may be being encountered by other teams and sections | E | Interview |
| Recognise when a procedure or policy is not working as effectively as it could and make suggestions as to how it could be improved | E | Interview |
| Be enthusiastic about the work of the service and the benefits it provides to its members | E | Interview |
| Demonstrate good IT and computer skills | E | Application form, Test, Interview |
| Promote equalities and diversity in the workplace | E | Interview |
| Be committed to the role and to be flexible, depending on the needs of the service | E | Application form, Interview |

**For Information:**

**Category**

E = Essential requirement without which the candidate would be unable to carry out the duties of the post

D = Desirable features that would normally enable the successful candidate to perform the duties and tasks better and more efficiently than one who did not have those qualifications, training, experience and so on